

## ELECTRONIC RESOURCES REVIEWS

**QuickDOC for Windows 2.1.1.** QuickDOC (Jay Daly), 45A Mason Terrace, Brookline, MA 02445-2611; 617.734.0918; fax, 617.734.3154; jdaly1@bidmc.harvard.edu; nnlm.gov/quickdoc/. Price: \$299.95 and \$89.95 annual fee (first year free). Requirements: Microsoft Windows, Internet Explorer, Microsoft Data Access Components (free).

One of the most resource-intensive functions of health sciences libraries is the handling of interlibrary loans (ILL). Along with the efforts required to identify items are the efforts expended locating lending sources; sending, tracking, receiving, and processing requests; recording costs and billing or recording payments; and generating periodic reports documenting all this activity. Daly has created software to help librarians manage these many interlibrary loan functions.

QuickDOC is an ILL-management system designed to interface with DOCLINE, the National Library of Medicine's (NLM's) ILL system. QuickDOC runs on Windows and has two components: the QDPortal Program and the QuickDOC Program. These components copy ILL requests and store them in a database on the local workstation. QuickDOC tracks all ILL requests and automatically updates DOCLINE statuses. It also stores borrowing and lending library addresses, patron and department information, and patron and library billing records.

QuickDOC does not replace DOCLINE; rather, it provides a companion system to facilitate certain aspects of ILL processing not handled in DOCLINE. The QDPortal program saves DOCLINE transactions (borrow, lend, and Loan-some Doc) automatically for importing into the QuickDOC program. The QuickDOC program includes a database for maintaining records, searching, editing, preparing electronic funds transfer systems (EFTS) files, statistics reports, and billing functions. The billing function invoices libraries and local patrons or departments and tracks

payments to them. QuickDOC stores data in a Microsoft Access 2000-compatible database.

QuickDOC's strength lies in its easy-to-search database and the associated well-developed billing functions. With all of the data on a request stored in QuickDOC's tables, generating bills is simple and quick. One simply searches for the request using one of six search methods, marks the request as filled, and sets a charge amount. Tracking payments is also easy. QuickDOC contains a feature for creating EFTS files. A library can enter nonstandard requests, such as OCLC or fax requests, into QuickDOC and can generate reports and bills for those.

Daly created QuickDOC more than ten years ago to handle the ILL transactions of his busy hospital library. QuickDOC's appeal is still highest for hospital libraries where ILL transactions can consume resources and where only one or two staff members are charged with managing ILL traffic. QuickDOC is designed for installation on a single personal computer, although it can operate on multiple workstations on a library network with the main database file on a shared network drive.

While some libraries have experienced minor installation glitches, the reviewers have installed QuickDOC for use with DOCLINE 1.5 without problems. Often, installation troubles are caused by a combination of hospital Internet security systems, software interaction anomalies, hardware changes, and librarians' lack of knowledge. If this sounds too technical, do not worry. Daly and fellow QuickDOC users are very helpful, quickly answering questions posted on the QuickDOC email list. The email list is the preferred first step for technical support, along with the searchable list archive. Daly will telephone library staff to work through any unresolved problems. The user manual, available on the Web, is very thorough and contains helpful information for systems

staff. Daly is well liked for his personable service and support.

Three main sections of the QuickDOC Program need to be configured to use QuickDOC: the library's setup page, the file of patrons, and the file of libraries. The library setup page is used to access DOCLINE and includes the default DOCLINE routing information:

- default number of days before a request is considered "not needed after," which triggers an automatic DOCLINE response;
- information in the comment field of the DOCLINE request (i.e., electronic delivery formats, rush deadline, special email address);
- default library charge profile and a file of default charges used to indicate what lending libraries usually charge (e.g., \$9, \$5, free); and
- standard billing information such as cost center name, "make checks payable to" name, and fax, telephone, or email contacts for billing inquiries.

QuickDOC uses these setup defaults to complete sections of a standard request.

The patron database file is created as requests are entered in QuickDOC. Library staff members can search and edit patron records to include department locations, associated cost centers, billing or mailing addresses, prefixes, suffixes, and library-assigned user categories. This information is used to generate bills and statistics reports.

In a similar manner, a library database file is created. The basic information about the lending library is retrieved from DOCLINE requests. The processing library then uses the LIBID to search DOCLINE for contact information and ILL costs and information, which are entered into the QuickDOC library database:

- updating any standard charges associated with the lending or borrowing library,
  - entering networks or groups (e.g., FreeShare), and
  - updating contacts and addresses.
- As with the patron database file, this information is used to generate bills and reports. The more com-

plete the library records are, the more thorough the QuickDOC reports and billing information can be.

Of course, QuickDOC tracks all the journals used in both borrowing and lending, down to the number of pages of the articles requested. The journals list must be edited to eliminate title variations and misspellings. These data are searchable by dates, so reports of journal usage can be almost instantly generated. A copyright report including number of pages is also available. For busy libraries, this is a real timesaver in meeting copyright-compliance payment responsibilities.

For those who have Loansome Doc patrons, QuickDOC tracks that system, too. If patron records are set up appropriately, QuickDOC will automatically track costs and charges for Loansome Doc requests. A separate report of Loansome Doc requests filled from local collections is also available. Transferring Loansome Doc requests to DOCLINE is easy, and requests are automatically tracked in the regular ILL statistics.

QuickDOC has extensive reporting capabilities. Summary reports are available for essential tallies, and more detailed reports can be generated when specifics are required. Reports are selected from pull-down menus, and on-screen previews are available prior to printing. Trial invoices can be generated, allowing comparison of report numbers and totals to invoice numbers and totals. QuickDOC data can also be exported for use in programs such as Microsoft Access.

QuickDOC has one primary weakness: it is not compliant with International Organization for Standardization (ISO) ILL protocol and thus cannot be used with OCLC. When DOCLINE releases an ISO ILL-compliant system, QuickDOC will be updated to use this method to communicate with DOCLINE. This change will also allow libraries to use QuickDOC to track requests in OCLC and other

ISO ILL-compliant systems. The goal is to have these features available sometime in late 2003. The QDPortal Program will remain as an alternate method of data entry that will allow a careful move to full implementation of ISO 10161-10162.

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**Clio 3.5.** Clio Software, 114 Bedford Road, New Boston, NH 03070; 603.487.2391; fax, 603.487.2833; [www.cliosoftware.com](http://www.cliosoftware.com); [info@cliosoftware.com](mailto:info@cliosoftware.com). Price: Clio \$500–\$3,000 and \$250–\$1,500 annual fee (first year free); Clio-Advanced \$3,000–\$5,000 and \$500–\$2,000 annual fee (first year free). Requirements: Microsoft Windows and Microsoft Access 2000; ClioAdvanced requires a Web server and Macromedia Cold Fusion.

Clio is an interlibrary loan (ILL)-management system used by more than 800 institutions worldwide. Clio offers two packages, Clio and ClioAdvanced (formerly, ClioEDeliver and ClioWeb). Clio can be used for lending, borrowing, billing, statistics, and copyright management. ClioAdvanced also offers a patron Web interface and facilitates desktop delivery of articles via Ariel. Clio is compatible with both OCLC and DOCLINE and has a DOCLINE electronic funds transfer system (EFTS) module. With the recent release of Clio 3.5, both the lending and borrowing components can be linked to an online public access catalog (OPAC) to al-

low easy checking of library holdings.

Clio's interface with OCLC, which uses the ILL Micro Enhancer (ILLME) access software, is very streamlined and efficient. Both borrowing and lending transactions can be downloaded into the Clio database using a minimal two or three steps. The interface with DOCLINE is more tedious. The borrowing function requires several steps to upload requests into DOCLINE. Using Web forms (locally designed or as part of Clio-Advanced), libraries can import patron and citation information. Clio can also import Ovid Document Ordering requests. Libraries without these services must enter requests manually. After entering citations, staff members refer to the Review Details screen where requests are checked for accuracy, copyright and routing to DOCLINE, OCLC, or ALA form. After this step, the Create DOCLINE Borrowing Requests screen is used to upload requests to DOCLINE for processing. Then, six additional keystrokes are required to download the request number and other information from DOCLINE to ClioRequest. The lending function requires three separate sessions in DOCLINE, one to obtain receipts, another to update filled requests, and another to update rejected requests. Downloading more than 100 DOCLINE lending requests at a time has caused significant problems for some libraries, but this problem is reportedly fixed in Clio 3.5.

Loansome Doc requests present another multistep process. These requests are initially downloaded into the Clio lending database. If the library cannot fill the requests, they must be updated as unfilled in the lending database and then transferred in DOCLINE. They must then be separately downloaded into the Clio borrowing database.

Clio tracks the status of all ILL transactions. Borrowing requests can be retrieved via request number, title, author, lender, status, due date, patron, article title, and sub-

mission method. Lending requests can be retrieved via request number, borrower, title, author, date requested, date last updated, and shipped date. Clio includes library and patron databases. The library database is automatically built from ILL request data. The patron database takes time to maintain manually. For a fee, Clio Software will build the patron database from library registration or circulation databases.

A large variety of reports and statistics is available in Clio. The borrowing module runs reports on items received or unfilled, method received for copies and loans, copyright status report, copyright-compliance report, patron status report, borrowing requests by department, and others. The lending module offers reports on items filled or rejected, method by which copies or loans are filled, reasons for rejection, financial summary, lending turnaround time, branch library statistics, and others. Reports can also be limited by time periods and by groups of libraries. Specialized queries and reports can be designed and run using Microsoft Access.

Clio also has a billing module that can be used to track fees and payments for both patrons and libraries. Billing methods include account statements or individual invoices. Libraries can revise the Clio invoice to meet their standards. The Clio billing module can be used to bill additional library services and it tracks tax and tax-free accounts. The billing module is linked to the borrowing and lending interfaces. Clio has a DOCLINE EFTS module that is accurate and easy to use. However, the EFTS module cannot upload requests that did not originate in DOCLINE. Thus, if a library wants to use EFTS to bill for OCLC or ALA requests, the requests must be exported and uploaded separately (this feature will be added soon).

Using ClioAdvanced (formerly ClioEDeliver and ClioWeb) with Ariel allows patrons to request items, check request status, request renewals, and view articles on the

Web. The library can choose any or all of these functions and customize its site. Desktop delivery via ClioAdvanced is a patron pleaser.

ClioAdvanced monitors incoming Ariel files and automatically delivers them to patrons via a Web server. ClioAdvanced is unable to handle a large volume of incoming Ariel borrowing requests at a time, causing some staff time-management problems, but this problem has been resolved. Less of a problem but more a nuisance is that the number of scans made by the sending library determines the page count in Clio, requiring ILL staff to make adjustments for accurate copyright tracking.

Clio runs on Windows and requires Microsoft Access 2000. The OCLC ILLME 2.0 is required to use OCLC ILL functions. Clio is fairly easy to install on a single computer, but technical support is recommended for a multiple-computer Clio installation. ClioAdvanced requires technical support and a Web server with Macromedia Cold Fusion. The ClioAdvanced patron interface uses cookies.

Clio has an extensive help system. Frequently asked questions, manuals, and upgrades are accessible through a subscriber-only Website. Contacts and product demonstrations are also available on the Web. Clio also supports The Clio List, which is the main vehicle for system announcements. Technical support for operational problems is available, as well as onsite installation.

The reviewers understand that the Clio developers are currently testing a single-click transfer method to more efficiently expedite DOCLINE borrowing and lending. They will also add a built-in connection to the OCLC Web interface.

Clio states, "all too often software products expand into as complex a management problem as the original process." Clio has not turned itself into a complexity nightmare. Long-time users know that technical support has always been quick to make changes, correct software problems, and accommodate users. Clio eliminates the

need for multiple systems for billing, statistics, copyright, and articles to the desktop. Clio can meet the needs of either a hospital or an academic medical center library.

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**OCLC ILLiad.** Atlas Systems, 5301 Providence Road, Suite 20, Virginia Beach, VA 23464; 757.467.7872; fax, 757.467.7875; [www.oclc.org/illiad/](http://www.oclc.org/illiad/); [www.atlas-sys.com](http://www.atlas-sys.com). Price: \$2,000–\$5,000 plus optional maintenance contract. Requirements: Microsoft Windows, Microsoft Internet Information Server, Microsoft SQL server, Adobe Acrobat, and Microsoft Word; full system requirements at [www.oclc.org/illiad/planning/requirements.shtm](http://www.oclc.org/illiad/planning/requirements.shtm).

While libraries advanced with online public access catalogs (OPACs), online indexes, and electronic journals, interlibrary loan (ILL) departments lagged behind in technology until fairly recently. Thankfully, some enterprising software developers at Virginia Tech created ILLiad to help struggling ILL departments survive under increasing workload demands. As the software evolved, the developers branched off and formed their own company, Atlas Systems, which was subsequently purchased by OCLC. Designed to improve the efficiency of the ILL process, ILLiad decreases turnaround time, maintains copyright records, tracks financial records, produces statistics reports, and facilitates electronic delivery.

From the reviewers' experience, ILLiad works almost flawlessly



with OCLC in both lending and borrowing, so the focus of this review will be on how well ILLiad works with DOCLINE and Loansome Doc.

With ILLiad, the lending processes for both OCLC and DOCLINE are very similar. ILLiad produces clear, well-organized lending pull slips in alphabetical or call number order, integrating requests downloaded from both OCLC and DOCLINE. Importing of lending requests from DOCLINE to ILLiad is easy when using Internet Explorer. However, imports are problematic with some versions of Netscape, and requests may be lost. Billing, invoicing, and tracking of DOCLINE lending requests is very easy with ILLiad, which simplifies record keeping significantly. However, ILLiad lacks a mechanism to automatically update DOCLINE requests, which means requests must be updated in both ILLiad and DOCLINE. Finally, Loansome Doc requests must be imported into the ILLiad borrowing module, which may cause workflow problems if the majority of requests are filled inhouse.

Borrowing via DOCLINE is generally problem-free but uploading requests from ILLiad into DOCLINE is not as seamless as it is with OCLC. Several fields, such as referral reason and need-by date, are not transferred and must be manually entered in DOCLINE for each request. Other than these hindrances, using ILLiad has many benefits. For example, if the MEDLINE UI is available, it can easily be uploaded from ILLiad to DOCLINE to locate the correct citation. Also, request numbers and the LIBIDs of potential lending libraries are imported directly into the ILLiad record. When items are received electronically, ILL staff can use ILLiad to email documents or post them to a Web server for patron download. Articles received in paper format or held in local collections can also be scanned for electronic delivery using the ILLiad patron interface.

ILLiad's copyright maintenance is a great improvement over manual record keeping. However, it is

important to remember that titles need to be uniform throughout, because spelling errors, punctuation changes, and differences in capitalization confuse ILLiad, which considers each entry as a separate journal title. For the most part, this is not a problem with OCLC because ILLiad imports the cataloged title directly from OCLC, making the records consistent. However, DOCLINE uses title abbreviations, and ILLiad cannot match these to the full titles found in OCLC. ILL staff who use both OCLC and DOCLINE must match and total requests from both systems. Considering the improvements to service and work flow, these problems seem insignificant to any ILL office that has experienced the burden of paper requests and illegible handwriting.

One convenient feature is the billing module that can be customized to fit a library's billing pattern. It generates invoices, tracks payments, and interfaces well with ILL records. Though the billing module works with DOCLINE's electronic fund transfer system (EFTS), it does have some inconveniences that do not occur with OCLC's ILL fee management service (IFM). For example, each time a library is added to ILLiad, a completely different screen in ILLiad must be opened to indicate that EFTS is the billing method, creating a cumbersome process. Atlas staff members are working on this irksome issue. ILLiad keeps EFTS information in a separate file that can be emailed to the EFTS office in Connecticut.

Patrons enjoy ILLiad, because it allows them to view the entire ILL process from start to finish, which in the past was a mystery. Automatic electronic processing of articles is very popular because of the clarity of the copy combined with the convenience of desktop delivery. ILLiad also automatically emails patrons when requests are available, saving staff time. The most puzzling tracking term for patrons is "Request sent," meaning sent out to a library. Patrons often interpret this to mean that the article or book has arrived and is be-

ing "sent" via their preferred delivery method.

ILLiad is a server-based program that requires Microsoft Windows Server, Internet Information Server, and SQL Server. The ILLiad client program is installed on staff workstations. Installing and maintaining an ILLiad server requires systems staff support. For an additional fee, Atlas provides server hosting, removing all need to install and maintain servers onsite. Due to the cost and time invested for implementation and maintenance, ILLiad software is more advantageous for libraries with a large volume of interlibrary loans.

In the past, Atlas responded fairly quickly to problems, but since OCLC bought the company, technical support became slower. Contacting Atlas directly receives a quicker response than going through OCLC's User & Network Support. ILLiad also has an email list for peer support. This list is a good way to ask other ILLiad librarians for assistance with problems or to vent frustration. Medical librarians on the email list are willing to help and share their experiences with others.

Overall ILLiad's positives outweigh the negatives. As more medical and health sciences libraries acquire ILLiad, OCLC and Atlas will work to eliminate the DOCLINE and Loansome Doc incompatibilities.

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**Prospero 2.0.** Prior Health Sciences Library, The Ohio State University, 376 West 10th Avenue, Columbus, OH 43210; 614.292.4861; bones.med.ohio-state.edu/prospero/. Price: Free (GNU General Public License). Staff module: Windows, scanner; Server module: Web server, Perl.

Prospero is a Web-based document delivery system created in May 1999 by the staff of the Prior Health Sciences Library at The Ohio State University. The current version is 2.0, released March 2002. Prospero is free, open source software. Anyone can download and use the program, modify it to suit their needs, and distribute the modifications to others—all without purchasing a license or paying maintenance fees. However, the Prospero project has no budget, and technical support is only available via the Prospero email list and from other users.

The University of Connecticut's Medical Library began using Prospero 1.35 in 2000 and then started using Ariel 3.01 to send portable document format (PDF) and tagged image file format (TIFF) documents to a Web server in December 2001. The library director at Qualidigm in Middletown, Connecticut, implemented Ariel 3.01 and Prospero 2.0 in December of 2002. This review reflects the experiences at both libraries.

Originally designed to work with Ariel, Prospero can also be used as a standalone document delivery system. Prospero converts TIFF documents to PDF and transfers them to an authenticated Website. Libraries can exchange digital copies of articles with other libraries and deliver them to the patron's desktop by email or Web. No paper is needed. Prospero sends patrons emails containing the Web address of the requested articles, and patrons access it directly from their workstations. Both the University of Connecticut and Qualidigm had problems successfully installing Prospero. In both cases, after patrons logged in on the Web to view their documents, nothing appeared even though the documents had been successfully posted to the

Web server. Systems staff eventually had to access the Prospero email list and archives to resolve the problem.

Although staff can download the necessary files from The Ohio State University's Prospero Website, most libraries will need to rely on institutional information technology (IT) or systems staff to install and configure Prospero. Systems staff will need to carefully follow the Prospero 2.0 Server Side Module Guide. Assistance from systems staff may also be necessary to configure the Prospero staff module. The Staff Module Guide is easy to understand and follow. Fortunately, Prospero is compatible with many commercially available scanners. The Prospero email list and archives are very useful when systems problems are encountered. Firewall issues, while better addressed by version 2.0, may still pose installation problems for some institutions. Prospero transmits documents by file transfer protocol (FTP) and supports the use of an FTP proxy. Although configuring Prospero to receive documents independent of Ariel is not difficult, just how this is done is not apparent from the documentation. Once a particular version of Prospero is installed, very little systems staff time is required until the next upgrade.

From the staff point of view, Prospero is simple to use. Staff will find that sending and receiving documents takes only a few clicks. A document can be scanned and sent to another Prospero or Ariel site by Internet protocol (IP) address. The main screen of the staff module displays five menu options and six tabs. The tabs display information in various Prospero directories. The tool bar allows for particular actions such as scanning, although many functions require use of the right mouse button. Staff can configure automatic email messages and add information to the User List without any real difficulties. Patrons receive email notifications when documents are ready and can easily retrieve them from the Web. Copyright notices are pre-

sented to patrons when documents are displayed. Staff can limit the number of times a document may be viewed, and Prospero can delete documents after a time limit has passed. Both the receiving and sending functions in Prospero are very easy for staff to learn and use.

Prospero 1.0 was designed to work with Ariel. Prospero provided patron management, conversion from TIFF to PDF, and communication between Ariel and the Web server. Ariel 3 includes features that mimic Prospero's Web interface. However, rather than becoming obsolete, Prospero was upgraded to function independently. Prospero 2.0 can transmit and receive documents over the Internet, allowing libraries to send and receive documents to other Prospero and Ariel sites without using Ariel. It is still easy for staff to use, and, perhaps more importantly, it is still *free*.

Because there is no funding for enhancements or upgrades to Prospero, its future depends on the developers and users creating and sharing modifications. Ariel is commercially supported but Infotrieve, a commercial company, recently purchased Ariel from RLG. This has created lively debate on the Prospero and Ariel discussion lists, and what the future will bring is not known. Prospero 2.0 allows libraries to provide excellent document delivery options to their patrons. More importantly, because it is open source software, libraries can modify Prospero to fit their needs and make additional improvements. Prospero can be as good as we want to make it.

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<p><b>Reading list</b></p> <ul style="list-style-type: none"> <li>■ CHUDNOV D. Open source software: the future of library systems? <i>Libr J</i> 1999 Aug;124(13):40–3.</li> <li>■ MICKEY B. Open source and libraries: an interview with Dan Chudnov. <i>Online</i> 2001;25(1).</li> <li>■ Prospero discussion list. [Internet]. Columbus, OH: The Ohio State Uni-</li> </ul>	<p>versity. [cited 20 Mar 2003]. &lt;<a href="http://auto.med.ohio-state.edu/mailman/listinfo/prospero/">http://auto.med.ohio-state.edu/mailman/listinfo/prospero/</a>&gt;.</p> <ul style="list-style-type: none"> <li>■ SCHNELL EH. Freeing Ariel: the Prospero Document Delivery Project. <i>J Interlibrary Loan, Document Delivery, and Information Supply</i> 1999;10(2):89–100.</li> <li>■ WEIBLE C, ROBBEN C. 2002.</li> </ul>	<p>Calming the tempest: the benefits of using Prospero for electronic document delivery in a large academic library. <i>J Interlibrary Loan, Document Delivery and Information Supply</i> 2001;12(4):79–86.</p> <ul style="list-style-type: none"> <li>■ MORGAN EL. Possibilities for open source software in libraries. <i>Inf Tech Libr</i> 2002;21(1):12–5.</li> </ul>
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